Scheiderer PARTNERS

Communications Audit

Report to Seattle City Employees' Retirement System Board of Administration

September 12, 2013

Cynthia Scheiderer

Audit Objectives

We looked both communications process and content, based on these objectives:

Process:

- Communications should be responsive and courteous
- The process should be as efficient as possible in order to be respectful of members' time and to manage and steward department resources well

Content:

- Should be useful, complete, accurate
- Should meet the needs of the members
- Should be easy to find and navigate

Methodology

- Interviews and “shadowing” of 15 SCERS team members: board, executive leadership, and staff
- In-depth interviews with 7 recent retirees
- Meetings with 5 internal stakeholders from other departments and from ARSCE
- Page-by-page audit of the SCERS website
- Assessment of more than 150 department documents, forms, publications, and letters
- Review of the websites of twelve other city retirement services of cities from 500,000 to 1.2 million in population
- Content analysis of these cities’ most recent newsletters

Excellent Communication

We organized our findings around five factors for excellent communication:

- Setting the team up for success: internal processes, policies, and tools
- Responsiveness
- Content and credibility
- Courtesy
- Expectation setting

Based on these findings, we have made recommendations in each of these areas:

- Responsive communications
- Content and documents
- Proactive outreach

Setting up the team for success

Top findings:

- Internal processes, policies, and tools need updating
- Member service is dependent on being able to access information
- Communications work is not being done in a vacuum

"The thing that bothers me the most, it's not that people here don't want to get people's answers to them quickly, it's that we don't have the mechanisms to let us do it."
–Team Member

- We are coordinating with parallel processes to examine department business processes and tools

Responsiveness

Top findings:

- Members express difficulty with *access* to the retirement office
- Getting a call back and getting connected with the right person to help them is sometimes difficult

"Once I got in there everyone was very nice and courteous, I especially enjoyed working with the person in the interview. But getting in there was very hard."
–Recent retiree

- Some processes take much longer than members expect

Content

Top findings:

- Content is extremely difficult to navigate—for members *and* staff
- Style and tone of material varies widely
- Lack of rigor around asking members for their information
- Missed opportunities to build credibility and clarity with a consistent style, look and feel

"I would like it if the information wasn't in legalese, but bullet points, you know, you need to do these things, rather than this is all the information, too much information. What I didn't have was the information about how far in advance I needed to start, what I needed to do, and what decisions I needed to make."

–Recent retiree

Courtesy

Top findings:

- Members are pleased with the courtesy and helpfulness of staff
- Retirement specialists in particular are described as knowledgeable and helpful
- Team members are conscientious about getting things right

> *"My experience is when people actually get in the door to start the retirement process, the vast majority come back with really good things to say about their experience."*
> *–Internal stakeholder*

- Team members are sensitive to the life transitions members may be going through
- While customer service skills may vary on the team, the desire to deliver good service seems to be there

Expectation Setting

Top findings:

- The process takes time—more time than people realize
- Members can be surprised by the requirements for in-person steps and original documents
- There are "hand offs" between City departments, and between the City and other parties, that sometimes make the process difficult for members to navigate
- "Hand offs" inside the retirement office sometimes make the process inefficient

> *"It was extremely confusing. Some things you were supposed to contact HR for, some things you contact payroll for, and for some things you contact retirement. It wasn't clear to me which was which, so I would call one and they would say, no, call somewhere else."*
>
> *–Recent retiree*

Recommendations: Responsive Communications

Document common retirement processes and create an internal knowledge base that organizes content *by process*.

Update information storage and retrieval tools and introduce case management tools (CRM).

Begin tracking a handful of basic contact metrics and use the information to inform communication:

- Contact volume
- Contact topic
- Response time
- Time to case closure

Recommendations: Content and Documents

Update SCERS documents, forms and correspondence:

- Make documents clearly identifiable by *audience* and *process*
- Ask for all of the necessary information, and only necessary information
- Adhere to a consistent style to improve clarity, ease of use, and credibility; avoid unexplained acronyms, jargon, and "legalese"
- Introduce document control conventions and a retention/archiving schedule
- Documents should clearly answer the following questions from the *member's* point of view: Is this form, document, or web page relevant to me? What will this form, document, or web page help me accomplish or learn?

Recommendations: Content and Documents

Update the SCERS website:

- Organize information by audience (e.g., active member, retiree, beneficiary) and then by process
- Separate service-related content and public accountability/transparency content for ease of access to each type of information
- Provide "meaning-making" information: explanatory information from the *member's* point of view that answers the questions: "Is this relevant to me?" and "Is this the information I need to accomplish what I came here to do?"
- Use a simple "look and feel," professional and consistent with the City's brand guidelines; emphasize ease of navigation and clarity over graphics and photos

Recommendations: Proactive Outreach

Promote the “Lunch and Learn” workshops more heavily

Introduce quarterly guest lunches with members and stakeholders

Consider introducing a newsletter on a limited schedule—two times a year—to accomplish the following:

- Remind people to start informing themselves *early* if they are thinking about retiring in the next year or two
- Provide information on basic processes such as address changes and beneficiary changes
- Educate and clear up confusion on commonly misunderstood topics (such as, defined contribution vs. defined benefit)
- Remind people of upcoming workshops and seminars

Scheiderer
PARTNERS

Cynthia Scheiderer
Cynthia@ScheidererPartners.com
(206) 769-8357